

## Past Performance Questionnaire

You have been identified as a past performance reference for the contractor indicated in Block 1 below for the contract indicated in Block 2 below. This contractor is proposing on a U.S. Patent and Trademark Office (USPTO) acquisition for USPTO's Enterprise Contact Center Services. We value your input and appreciate greatly your willingness to thoughtfully complete this questionnaire.

Please complete the following steps (1) Fully complete this questionnaire, (2) Place in a sealed envelope which contains your agency's/company's letter head and (3) Return to the offeror you evaluated for inclusion in offeror's proposal to be submitted to the USPTO by the closing date. If you have questions, please contact our Contracting Officer, Mr. Chris Hannah, at (703)-305-8563.

Please note the following regarding the confidentiality of your assessment:

By law, the Government will not disclose the names of individuals providing reference information during discussions with the contractor identified in Block 1 below.

Block 1. Contractor Name:
Block 2. Contract Name/Identifier:

I HEREBY CERTIFY THAT THE INFORMATION PROVIDED IN THIS QUESTIONNAIRE IS ACCURATE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

CUSTOMER ORGANIZATION  
NAME AND ADDRESS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CONTRACT AWARD DATE  
CONTRACT COMPLETION DATE

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Evaluator's Printed Name

\_\_\_\_\_  
Title/Role (e.g., Program Manager, Contracting Officer)

\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone

## Instructions

Please read each section for specific information on how to fill rate or answer each question.

We request that you use the supplemental information section of the questionnaire to justify your ratings and answers, making sure to identify your comments with the appropriate question number. You may expand on and more fully discuss any of the questions. Use extra pages as necessary. Negative responses may be referred to the contractor to permit rebuttal. Neither your name nor position within your organization will be divulged either during or after this survey has been completed.

## Contract Information

Contractor/Division: \_\_\_\_\_

Program Title: \_\_\_\_\_

Contract Number: \_\_\_\_\_

Period of Performance: \_\_\_\_\_

Type of Contract: \_\_\_\_\_

Type of Call Center services work contractor performed for you on this contract.

### CHECK ALL THAT APPLY

<input type="checkbox"/>	Provided support to multiple centers in multiple buildings.
<input type="checkbox"/>	Scheduled and operated appropriate support functions in multiple locations.
<input type="checkbox"/>	Emphasized customer-oriented vision.

SHORT ANSWER	Write short descriptive information in each blank.
1. What type of Products/Services were provided under your contract?	
2. What type of contract?	
3. Competitive or Non-competitive?	
4. Total Value of Contract?	
5. Period of Performance?	
6. How frequently did you have to direct the contractor to re-perform the service because it had been performed unsatisfactorily the first time?	

BEST ANSWER	Circle the best answer.					
7. If there was a cost overrun (delivery delays) in your opinion, how much of the overrun/delay was attributable to contractor management?	All	Most	Half	Little	None	NA

Next to each of the questions you will find the following choices:

- 4 - Exceptional** – Performance was exceptional and consistently exceeded expectations, including the requirements on the contract, while staying on schedule with little or no Government assistance.
- 3 - Good** – The offerors past performance under prior contracts has been commendable. The offeror met, and sometimes exceeded the performance requirements of the contract with some Government assistance.
- 2 - Acceptable** – The offerors past performance under prior contracts has been adequate. The offeror met the performance requirements of the contract satisfactorily, but needed considerable Government supervision and assistance to do this.
- 1 - Questionable** – The offerors past performance under prior contracts has been adequate. The offeror met most of the performance requirements of the contract, but due to significant problems, needed considerable Government supervision and assistance to do this.
- 0 - Unacceptable** – The offerors past performance under prior contracts has been poor. The offeror failed to meet minimum performance requirements of the contract and/or the performance of the offeror was extraordinarily poor, requiring a very high degree of management intervention.
- N - Not Applicable** – The offeror was not required to perform in this area on this contract.

Category 0 or 1 responses may be referred to the contractor to permit rebuttal. Neither your name nor position within your organization will be divulged either during or after this survey has been completed.

**PLEASE CHECK THE COLUMN, IN YOUR JUDGEMENT, MOST APPROPRIATELY REFLECTS YOUR EXPERIENCE WITH THE CONTRACTOR.**

CUSTOMER SATISFACTION	Exceptional	Good	Acceptable	Questionable	Unacceptable	NA
8. How would you describe the contractor's commitment to customer satisfaction?						
9. How well did contractor interface with the end user of the product/service? How well were Customer expectation(s)/requirements met?						
10. How committed was the contractor to providing resources as necessary to resolve customer problems?						
11. How well did the contractor work with project/contracting officers and technical staff For instance, how cooperative was the contractor when technical problems were encountered? - Prompt notification of problems - Reasonable, cooperative, and flexible - Recommended viable solutions						
12. How well did the contractor work with 3 <sup>rd</sup> party telecom providers (such as 800 number and T-1/PRI telecom providers)?						
13. How well did the contractor work with other system developers (such as help desk, enterprise asset management, telephony and CRM experts)?						

<b>QUALITY OF SERVICE</b>	<b>Exceptional</b>	<b>Good</b>	<b>Acceptable</b>	<b>Questionable</b>	<b>Unacceptable</b>	<b>NA</b>
14. How was the contractor's quality of products/services? Contract Compliance, Appropriateness of personnel, and Accuracy of Reports?						
15. Based on your experience with this contractor, how reliable do you think it can be to deliver quality products/services by specified delivery dates?						
<b>PERSONNEL</b>	<b>Exceptional</b>	<b>Good</b>	<b>Acceptable</b>	<b>Questionable</b>	<b>Unacceptable</b>	<b>NA</b>
16. How well were you able to assess the contractor's key personnel? - How long did they stay on contract? - Did they effectively manage contract? - Were they responsive to technical direction?						
17. Assess the contractor's ability to recruit, screen, assign responsibility, train, retain, support and replace staff.						
<b>PROJECT MANAGEMENT</b>	<b>Exceptional</b>	<b>Good</b>	<b>Acceptable</b>	<b>Questionable</b>	<b>Unacceptable</b>	<b>NA</b>
18. How well did the contractor meet goals and objectives? How well did the contractor respond to unexpected changes in scope or requirements?						
19. How well did the contractor comply with overall timeliness? - Met interim milestones reliably - Responsive to technical direction - Met all delivery schedules on time						
20. Timely notification to government of problems						
21. How well did the contractor closely adhere to contract/delivery schedules?						
22. How well did the contractor submit timely reports and documentation?						
23. How well did the contractor use and submit timely and accurate problem reporting?						
24. How well did the contractor provide effective subcontract management?						
<b>COST MANAGEMENT</b>	<b>Exceptional</b>	<b>Good</b>	<b>Acceptable</b>	<b>Questionable</b>	<b>Unacceptable</b>	<b>NA</b>
25. Assess contractor's innovative actions that reduced overall Call Center costs						
26. How well did the contractor control costs? - Within budget (over/under target costs) - Contractor provided current, accurate, and complete billings - Relationships of negotiated costs to actuals (cost efficiencies)						
27. How well did the contractor provide accurate and reasonable estimates of cost?						

OVERALL EVALUATION	Exceptional	Good	Acceptable	Questionable	Unacceptable	NA
28. How would you rate the contractor's overall performance?						

QUESTIONS:

WOULD YOU AWARD ANOTHER CONTRACT TO THIS VENDOR/CONTRACTOR?

**YES** \_\_\_\_\_ **OR** **NO** \_\_\_\_\_

INDICATE REASONS FOR YOUR RESPONSE (additional comments may be attached)

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## Supplemental Information

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